

MAIL TO:  
Office of the Attorney General  
Registry of Charitable Trusts  
P.O. Box 903447  
Sacramento, CA 94203-4470

# COMMERCIAL FUNDRAISER FOR CHARITABLE PURPOSES

## ANNUAL FINANCIAL REPORT FOR 2003

(California Government Code Section 12599)



Failure to file annual financial report by January 30<sup>th</sup> annually for each calendar year of solicitation may result in late fees as defined in Government Code Section 12586.1

An annual financial report must be filed for each event for each charity solicited for during the previous calendar year.

STREET ADDRESS:  
1300 I Street  
Sacramento, CA 95814  
Telephone: (916) 323-5079

WEB SITE ADDRESS:  
<http://ag.ca.gov/charities/>

Name and Address of Commercial Fundraiser:

Gift Planning Direct, LLC  
11500 West Olympic Blvd., Ste. 540  
Los Angeles, CA 90064

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Name and Address of Charitable Organization:

CT No. 36759 F.E.I.N. No. 953313195

Greenpeace Fund, Inc.

Name of charity  
702 H Street, NW, Ste. 300

Address of charity  
Washington, DC 20001

City, State, and ZIP code of charity

Figures from (check one): National Campaign ☒ California Campaign ☐

Telemarketing

(Type of activity)

held (on) (from) 1/1/03, 20 to 12/31/03, 20  
(Date or dates must be shown)

Is the contract between the commercial fundraiser and charity based upon a fee or percentage of revenue? Fee ☒ Percent age ☐ Other ☐  
If other, provide brief explanation

### 1. REVENUE

- A. Cash contributions
- B. Entertainment sales or admission charges
- C. Sales from products
- D. Advertisement sales
- E. Membership fees
- F. Other sources: (Specify)

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_
- d. \_\_\_\_\_

### G. TOTAL REVENUE

Expect revenues to be collected over the next ten years as a result of estate planning education of member prospects (see attached explanation)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

FD.  
Fc.  
Fd.

603

G.

### 2. EXPENSES

- A. Fees or commissions
- B. Salaries
- C. Payroll taxes
- D. Employee benefits
- E. Cost of merchandise for resale
- F. Cost of entertainment
- G. Postage
- H. Advertising
- I. Telephone
- J. Rental of equipment
- K. Facilities charge
- L. Permits
- M. Other expenses: (Specify)

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_
- d. \_\_\_\_\_

### N. TOTAL EXPENSES

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

A.  
B.  
C.  
D.

Please see attached breakdown of expenses

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

J.  
K.  
L.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Ma.  
Mb.  
Mc.  
Md.

\$19,195.60 N.



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GIFT PLANNING DIRECT EXPENSE ALLOCATION

	19,195.60
PRINTING EXPENSES	2,905.21
SUB CONTRACT EXPENSES	3,194.14
PROGRAM MANAGEMENT EXPENSES	440.68
SALARY/CONSULTANT EXPENSES	2,026.58
	0.00
LICENCING/REGISTRATION FEES	1,227.97
DEPRECIATION	62.99
GENERAL OFFICE	177.97
	0.00
	0.00
	0.00
	0.00
	0.00
	0.00
	0.00
	0.00
GROSS PROFIT	9,160.05
Total	19,195.60